

Local Initiative Program



Application for Comprehensive Permit Projects

10/1/03



Department of Housing & Community Development
One Congress Street, 10th Floor - Boston, MA 02114 - 617-727-7765

INSTRUCTIONS

Please submit three copies of the application plus two copies of all drawings. The submittal must include a check for the processing fee, payable to DHCD, for \$1500 per project plus \$20 per unit.

Mail to:
Department of Housing & Community Development
One Congress Street, 10th Floor
Boston, MA 02114
Attn: Office of Sustainable Development

Email to:
marilyn.contreas@ocd.state.ma.us

Note that for email submissions, all attachments plus payment must be sent separately by regular mail.

Most questions are self-explanatory. If you need assistance, please contact Marilyn Contreas at 617-727-7001 x 408.

For question 12 on page 5, please provide the general designation of zoning (e.g. residential, business, mixed-use). Do not provide only the specific municipal category (e.g. R-1).

For question 4 on page 6, "affordable units" must be at least 25% of the total and must be affordable to households with incomes at or below 80% of area median. Refer to the Guidelines for more information. "Other units" are those that are made available under special financing or special agreement (e.g. with Section 8 vouchers or through MassHousing programs).

For rental projects, you must use the One Stop Application, available online at www.onestopapp.com, instead of Unit Composition (page 8) and Ownership Pro Forma (page 11). Contact DHCD for assistance.

Some required attachments (see Checklist, page 17) are not explained in the application. The letter of interest from a construction lender should be pertinent to the proposed project. The map of the community highlighting the site can be any type of map showing at least major roads. The rationale for the affordable prices should explain what assumptions were made and what factors were considered.

Application Contents

General Information	p. 1
Municipal Contact Information	p. 2
Community Support	p. 3
The Site	p. 4
Surrounding Neighborhood & Community	p. 5
The Project	p. 6
Design and Construction	p. 9
Project Feasibility	p. 11
The Development Team	p. 13
Marketing and Lottery Plans	p. 16
Checklist of Attachments	p. 17

Department of Housing & Community Development
Local Initiative Program
Application for Comprehensive Permit Projects

GENERAL INFORMATION

1. Community: _____
2. Name of Development: _____
3. Site Address: _____
4. Developer: _____
5. Municipal Project Contact: _____
6. Title: _____
7. Address: _____
8. Phone: _____ Fax: _____
10. Email: _____

11. Type of Housing:
- | | |
|--------------------------------------|---|
| <input type="checkbox"/> Fee Simple | <input type="checkbox"/> Rental |
| <input type="checkbox"/> Condominium | <input type="checkbox"/> Age Restricted |

12. Project Characteristics:
- | | |
|---|-------------------------------------|
| <input type="checkbox"/> New Construction | <input type="checkbox"/> Conversion |
| <input type="checkbox"/> Rehabilitation | <input type="checkbox"/> Other |

13. Total Acres _____ Density of Project (units/acre) _____

14. Are there wetlands on the site? ☐ Yes ☐ No

15. Unit Count:
- Total Number of Units _____ Affordable _____ Market _____

16. Unit Prices/Rents:
- | | |
|----------------------|--|
| Market Rate \$ _____ | |
| Affordable \$ _____ | |

17. Required Signatures:

Chief Elected Official of Municipality

Date

Chairman, Local Housing Partnership
(if applicable)

Date

Municipal Contact Information ~ Other than Project Contact

1. Chief Elected Official

Name _____
Address _____
Phone _____ Fax _____
Email _____

2. Town Administrator/Manager

Name _____
Address _____
Phone _____ Fax _____
Email _____

3. City/Town Planner (if any)

Name _____
Address _____
Phone _____ Fax _____
Email _____

4. Chairman, Zoning Board of Appeals

Name _____
Address _____
Phone _____ Fax _____
Email _____

5. Chairman, Local Housing Partnership (if any)

Name _____
Address _____
Phone _____ Fax _____
Email _____

Community Support

1. Letter of Support from Municipality

Attach a letter containing a short narrative on the basics of the project, the history of the project, the ways in which the community is providing support, and how the development team has addressed any concerns the community has. The letter must be signed by the chief elected official of the community.

2. Letter of Support from Local Housing Partnership

If the community has a housing partnership, please attach a letter from them indicating their support for the project. The letter should summarize how the partnership has been working with the developer.

3. Local Contributions

Check off all that apply and provide a brief description at the end.

- ☐ Land donation (dollar value _____)
- ☐ Building donation (dollar value _____)
- ☐ Marketing assistance
- ☐ Other work by local staff
- ☐ Density increase
- ☐ Waiver of permit fees
- ☐ Other regulatory or administrative relief (specify)

- ☐ Local funds (cash)
Amount \$_____
- ☐ Agreement by a lender to provide favorable end-loan financing (ownership projects only)
- ☐ Other (specify)

Briefly explain the contributions:

4. Conformance with Local Plans

If applicable, briefly describe how the project fits with any planning the community has done (e.g. master plan, EO 418 housing strategy or CD Plan, affordable housing plan).

The Site

1. Site Characteristics

Describe the site and note the presence of any development constraints such as wetlands or ledges. If there are any unusual site conditions, explain them here.

2. Describe the current and prior uses of the site. If there are any existing buildings, explain what will be done with them.

3. Is the site or any building on the site listed, nominated, or eligible for listing on the National or State Register of Historic Places? ☐ Yes ☐ No

4. Is the site located in or adjacent to an historic district? ☐ Yes ☐ No

5. Acreage

Acreage on site

Total buildable acreage

6. Site Control

☐ Developer owns the site. Attach a copy of the deed.

☐ Developer holds a Purchase and Sale agreement or option on the site.
Attach a copy of the P&S or option.

7. Value of Land

Attach verification of the value of the land either through the last arms-length transaction if the transaction occurred within the last three (3) years or through a current appraisal by a licensed appraiser showing the value of the land **under by-right zoning**.

8. Available Utilities & Infrastructure

☐ Public water

☐ Public sewer

☐ Private well

☐ Private sewer

☐ Public streets

☐ Septic system

☐ Private streets

☐ On-site package treatment or alternative

9. Is the site located near public transit (bus, subway, commuter rail, etc.)? If so, indicate the type, distance to the nearest stop, and frequency of service. _____

10. Describe any known or suspected hazardous waste sites on or within a ½ mile radius of the project site. _____

11. Has a 21E hazardous waste assessment ever been done on this site? If so, attach a summary of the filing.

___ Yes ___ No

12. Current Zoning

Zoning classification _____

Usage allowed _____

Units per acre allowed _____

13. Has the municipality denied a permit on another proposal for this site within the last 12 months?

___ Yes ___ No

14. What waivers will you be requesting under the comprehensive permit?

Surrounding Neighborhood & Community

1. Describe the land uses in the surrounding neighborhood. _____

2. What is the prevailing zoning in the surrounding neighborhood?

3. Describe nearby amenities and services such as shopping or recreation. _____

4. Is the site close to other affordable housing units? If so, provide the distance.

5. Explain how developing the site contributes to smart growth development in the area (e.g. mixed use, reuse, concentrated development), if at all. _____

The Project

1. Type of Project Total number of units

Fee simple

Condo

Rental

Other

- 2. Project Style Total number of units

Detached single-family

Rowhouse/townhouse

Duplex

Multifamily house (3+ family)

Apartment building

Other (specify)

- 3. If there will be multiple buildings, will they follow smart growth design (e.g. cluster)? Explain. _____
- 4. Unit Mix

	Number	Percentage of Total
Affordable (see Instructions)	_____	_____
Market Rate	_____	_____
Handicapped Accessible	_____	_____
Other (see Instructions)	_____	_____
Total Units	_____	_____
- 5. Will the project meet Energy Star Standards? If so, describe. _____

- 6. Estimate the percentage of the site used for:

Buildings _____

Parking & Paved Areas _____

Usable Open Space _____

Unusable Open Space _____

7. Development Schedule

Complete the chart below by providing the appropriate month and year. Fill in only as many columns as there are phases. If there will be more than three phases, add columns as needed.

	<u>Phase 1</u>	<u>Phase 2</u>	<u>Phase 3</u>	Total by type
Number of affordable units	_____	_____	_____	_____
Number of market units	_____	_____	_____	_____
Total by phase	_____	_____	_____	_____

Please complete the following chart with the appropriate projected dates:

All permits granted	_____	_____	_____
Construction start	_____	_____	_____
Marketing start - affordable units	_____	_____	_____
Marketing start - market units	_____	_____	_____
Construction completed Phase 1	_____	_____	_____
Initial occupancy	_____	_____	_____

8. If any public funds will be used to develop this project, please indicate the source, the amount, and the use. _____

9. Local tax rate per thousand: \$_____

10. Will all features and amenities available to market buyers also be available to affordable buyers? If not, explain the differences. _____

11. Unit Composition ~ Ownership Projects Only*

Complete the chart below. Include a separate entry for each unit type according to its square footage and/or sales price.

Type of Unit	# of Units	# of Bedrooms	# of Baths	Gross Sq. Ft.	# Parking Spaces	Sales Price	Condo Fee	Handicapped Accessible?
Affordable								
Market								
Other								

*For rental projects, please fill out the Unit Composition section of the One Stop Application. Contact DHCD for assistance.

Design and Construction

1. Drawings

Please submit two copies of all drawings. Preliminary drawings must be stamped and signed by a registered architect or engineer. Drawings should not be larger than 30" x 42" and must be folded into 8 ½" X 11".

Cover sheet showing written tabulation of:

- ☐ Proposed buildings by design, ownership type, and size
- ☐ Dwelling unit distribution by floor, size, and bedroom/bath number
- ☐ Square footage breakdown of commercial, residential, community, and other usage in the buildings
- ☐ Number of parking spaces

Site plan showing:

- ☐ Lot lines, streets, and existing buildings
- ☐ Proposed building footprint(s), parking (auto and bicycle), and general dimensions
- ☐ Zoning restrictions (i.e. setback requirements, easements, height restrictions, etc).
- ☐ Wetlands, contours, ledge, and other environmental constraints
- ☐ Identification of affordable units
- ☐ Sidewalks and recreational paths
- ☐ Site improvements, including landscaping

Utilities plan showing:

- ☐ Existing and proposed locations and types of sewage, water, drainage facilities, etc.

Graphic depiction of the design showing:

- ☐ Typical building plan
- ☐ Typical unit plan for each unit type with square footage tabulation
- ☐ Elevation, section, perspective, or photograph
- ☐ Typical wall section

2. Construction Information

<u>Foundations</u>	<u># Mkt Units</u>	<u># Affordable Units</u>	<u>Attic</u>	<u># Mkt Units</u>	<u># Affordable Units</u>
Slab on Grade	_____	_____	Unfinished	_____	_____
Crawl Space	_____	_____	Finished	_____	_____
Full Basement	_____	_____	Other	_____	_____

<u>Exterior Finish</u>	<u># Mkt Units</u>	<u># Affordable Units</u>	<u>Parking</u>	<u># Mkt Units</u>	<u># Affordable Units</u>
Wood	_____	_____	Outdoor	_____	_____
Vinyl	_____	_____	Covered	_____	_____
Brick	_____	_____	Garage	_____	_____
Fiber Cement	_____	_____	Bicycle	_____	_____
Other	_____	_____			

Heating System

Fuel: Oil _____ Gas _____ Electric _____ Other _____

Distribution method (air, water, steam, etc.): _____

Energy Efficient Materials

Describe any energy efficient or sustainable materials used in construction: _____

Non-Residential Space

Describe any non-residential construction on the site, e.g. office space, clubhouse, commercial space, etc. _____

Modular Construction

If modular construction will be used, explain here. _____

Project Feasibility ~ Ownership Projects*

1. Ownership Pro Forma

	Total Costs	Per Unit	Per Sq. Ft.	% of Total
(a) Site Acquisition	\$_____	\$_____	\$_____	_____
<u>Hard Costs:</u>				
Earth Work	\$_____	\$_____	\$_____	_____
Site Utilities	\$_____	\$_____	\$_____	_____
Roads & Walks	\$_____	\$_____	\$_____	_____
Site Improvement	\$_____	\$_____	\$_____	_____
Lawns & Planting	\$_____	\$_____	\$_____	_____
Demolition	\$_____	\$_____	\$_____	_____
Unusual Site Cond.	\$_____	\$_____	\$_____	_____
(b) Total Site Work	\$_____	\$_____	\$_____	_____
Concrete	\$_____	\$_____	\$_____	_____
Masonry	\$_____	\$_____	\$_____	_____
Metals	\$_____	\$_____	\$_____	_____
Carpentry	\$_____	\$_____	\$_____	_____
Roofing & Insulation	\$_____	\$_____	\$_____	_____
Doors & Windows	\$_____	\$_____	\$_____	_____
Interior Finishes	\$_____	\$_____	\$_____	_____
Cabinets & Appliances	\$_____	\$_____	\$_____	_____
Plumbing & HVAC	\$_____	\$_____	\$_____	_____
Electrical	\$_____	\$_____	\$_____	_____
(c) Total Construction	\$_____	\$_____	\$_____	_____
(d) General Conditions	\$_____	\$_____	\$_____	_____
(e) Subtotal Hard Costs (a+b+c+d)	\$_____	\$_____	\$_____	_____
(f) Contingency	\$_____	\$_____	\$_____	_____
(g) Total Hard Costs (e+f)	\$_____	\$_____	\$_____	_____
<u>Soft Costs:</u>				
Permits/Surveys	\$_____	\$_____	\$_____	_____
Architectural	\$_____	\$_____	\$_____	_____
Engineering	\$_____	\$_____	\$_____	_____
Legal	\$_____	\$_____	\$_____	_____
Bond Premium	\$_____	\$_____	\$_____	_____
Real Estate Taxes	\$_____	\$_____	\$_____	_____
Insurance	\$_____	\$_____	\$_____	_____
Security	\$_____	\$_____	\$_____	_____
Developer's Overhead	\$_____	\$_____	\$_____	_____
General Contractor's Overhead	\$_____	\$_____	\$_____	_____
Construction Manager	\$_____	\$_____	\$_____	_____
Property Manager	\$_____	\$_____	\$_____	_____
Construction Interest	\$_____	\$_____	\$_____	_____
Financing/Application Fees	\$_____	\$_____	\$_____	_____
Utilities	\$_____	\$_____	\$_____	_____

*For Rental Projects, fill out the Pro Forma from the One Stop Application.

Maintenance (unsold units)	\$ _____	\$ _____	\$ _____	_____
Accounting	\$ _____	\$ _____	\$ _____	_____
Marketing	\$ _____	\$ _____	\$ _____	_____
(h) Subtotal Soft Costs	\$ _____	\$ _____	\$ _____	_____
(i) Contingency	\$ _____	\$ _____	\$ _____	_____
(j) Total Soft Costs (h+i)	\$ _____	\$ _____	\$ _____	_____
(k) Total Development Costs (g+j)	\$ _____	\$ _____	\$ _____	_____

2. Profit Analysis (should conform to the pro forma)

Sources:

Affordable projected sales	\$ _____
Market sales	\$ _____
Public grants	\$ _____
(A) Total Sources	\$ _____

Uses:

Construction Contract Amount	\$ _____
(B) Total Development Costs	\$ _____

Profit:

(C) Total Profit (A-B)	\$ _____
(D) Percentage Profit (C/B)	\$ _____

3. Cost Analysis (should conform to the pro forma)

Total Gross Building Square Footage	_____
Residential Construction Cost per Sq. Ft.	\$ _____
Total Hard Costs per Sq. Ft.	\$ _____
Total Development Costs per Sq. Ft.	\$ _____
Sales per Sq. Ft. (do not include proceeds from public grants)	\$ _____

The Development Team ~ Contact Information and Experience

1. Developer

Name _____
Address _____
Phone _____ Fax _____
Email _____ Tax ID # _____

2. Contractor/Builder

Name _____
Address _____
Phone _____ Fax _____
Email _____ Tax ID # _____

3. Architect/Engineer

☐ LEED certified?

Name _____
Address _____
Phone _____ Fax _____
Email _____ Tax ID # _____

4. Attorney

Name _____
Address _____
Phone _____ Fax _____
Email _____ Tax ID # _____

5. Marketing Agent (if more than one, attach a separate sheet)

Name _____
Address _____
Phone _____ Fax _____
Email _____ Tax ID # _____

6. Consultant

Name _____
Address _____
Phone _____ Fax _____
Email _____ Tax ID # _____

7. Team Experience -- The Developer and Contractor

Complete the charts on the following pages for all housing projects undertaken by the developer and the contractor during the past three years. Include projects currently in construction. Provide owner references for each project, including a current phone number.

DEVELOPER'S EXPERIENCE

Project Name	Location	Number of Units	Subsidy Program	Type of Construction	Sales or Rental	Total Development Cost	Date of Completion	Reference: Name & Phone

CONTRACTOR'S EXPERIENCE

Project Name	Location	Number of Units	Subsidy Program	Type of Construction	Sales or Rental	Total Development Cost	Date of Completion	Reference: Name & Phone

Marketing and Lottery Plans

1. Marketing Plan

Please provide on a separate sheet a marketing plan in accordance with the LIP Guidelines. The marketing plan should be designed to reach all segments of the eligible population within the HUD region (see Appendix B of the Guidelines), should be specific to the project, and should contain sufficient information on: project size, unit mix, number and type (number of bedrooms) of affordable units, sales price or rent level, selection process for affordable units (e.g., lottery to be held), maximum qualifying income for the affordable units, local preference percentage and criteria (if any), and sales agent information, including telephone number. Describe the proposed time frame for marketing activities.

The marketing plan also needs to include a narrative on outreach to minority populations in the HUD region (Appendix C of Guidelines), including but not limited to: use of newspapers, notice to social service, religious, and/or civic organizations, employers or employer organizations, organizations offering homebuyer education programs, and public meetings.

2. Proposed Lottery Process for Affordable Units

A lottery process is most often used to achieve fair and open access to the project's affordable units. On a separate sheet, provide a description of the lottery process for this project that includes information on:

- income eligibility
- the application process
- where, when, and how to obtain an application
- plans for public meetings to be held to explain the lottery process
- preference categories including the number of units in each category
- who will oversee the lottery process

Refer to page 18 of the LIP Guidelines to prepare the description.

Checklist of Attachments

- ❑ Letter of support signed by Chief Elected Official of municipality
- ❑ Letter of support from local housing partnership (if applicable)
- ❑ Signed letter of interest from a construction lender (see Instructions)
- ❑ Map of community showing location of site (see Instructions)
- ❑ Directions to site from I93 or I90 in Boston or from nearest train station if appropriate (please do not use MapQuest or MapBlast)
- ❑ Check payable to DHCD
- ❑ Rationale for calculation of affordable purchase prices or rents (see Instructions)
- ❑ Copy of site control documentation (deed or Purchase & Sale or option agreement)
- ❑ Last arms length transaction or current appraisal under by-right zoning
- ❑ 21E summary (if applicable)
- ❑ Photograph of existing building(s) and/or site
- ❑ Site Plan showing location of affordable units
- ❑ Sample floor plans and/or sample elevations
- ❑ Marketing plan including plan for outreach to minorities
- ❑ Lottery plan